
Summary of Changes for the Application Processing System

2014–2015

U.S. Department of Education



F E D E R A L
S T U D E N T A I D

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Introduction

Overview

The *Summary of Changes for the Application Processing System* is designed to meet the reference needs of financial aid administrators (FAAs), programmers, and data processing staff. In this guide, we describe updates and enhancements to the 2014-2015 application processing system and to student and school Web products. We recommend you review the information provided in this guide, as some enhancements may require you to modify your office procedures and system operations.

The following sections are included in this guide:

- **Major Changes** – This section provides information about major changes for the 2014-2015 processing year and covers the following topics:
 - Marital Status Changes due to the Defense of Marriage Act Changes
 - Parental Information Changes
 - New Tax Return Filing Status Questions
 - New IRS Display Flags
 - Increased Field Lengths
 - Verification Enhancements
 - FAFSA on the Web Correction Instruction Enhancements
 - Loan Eligibility Changes
- **2014-2015 Application Processing System Schedule** – This section provides important processing deadlines and anticipated document and software release dates.
- **Summary of Changes to the 2014-2015 Paper *Free Application for Federal Student Aid* (FAFSA) and FAFSA on the Web** – This section provides descriptions of the FAFSA and FAFSA on the Web Worksheet, including information about requesting and receiving paper forms and downloading electronic forms. Changes to the 2014-2015 paper FAFSA and to the FAFSA on the Web site are also described.

- **Summary of Changes to FAA Access to CPS Online** – This section provides information about FAA Access to CPS Online (FAA Access) enrollment requirements and changes to the FAA Access Web site.
- **Summary of Changes to the 2014-2015 Central Processing System** – This section provides information about changes to the Department of Education's (Department's) Central Processing System (CPS). The following areas are described:
 - Database Matches
 - CPS Edits
 - Need Analysis
 - Application Output Sent to Students
 - Student Aid Report (SAR) Comments
- **Getting Help** – This section provides contact information for customer service and lists useful documents and Web sites you can access for additional assistance.

In addition to our annual 2014-2015 system updates that are implemented in January 2014, we plan to release additional system updates intermittently. Scheduling intermittent releases enables us to continuously improve our Web sites and other systems.

We will describe enhancements to be implemented during the processing cycle in various future communications posted on the Information for Financial Aid Professionals (IFAP) Web site at ifap.ed.gov, including electronic announcements and updated guides and references.

Unless otherwise noted, we are implementing the changes described in this guide in January 2014, at the start of the 2014-2015 processing cycle.

Major Changes

Description of Major Changes

In this section, we describe major changes to the application processing system and Web products for 2014-2015, including updates and enhancements resulting from annual and legislative changes. Policy and operational guidance can also be found on the IFAP Web site.

Marital Status Changes due to the Defense of Marriage Act Changes

On June 26, 2013 the Supreme Court struck down the section of the Defense of Marriage Act (DOMA) that provided that for purposes of federal programs, a marriage can only be between one man and one woman. Consistent with this decision, same-sex couples must report their marital status as married if they were legally married in a state or other jurisdiction (foreign country) that permits same-sex marriage. We have revised the FAFSA and FAFSA on the Web to provide additional guidance to applicants who are same-sex married couples or have same-sex married parents. For further information about the DOMA changes and the implications for Title IV student financial assistance programs, see [Dear Colleague Letter GEN-13-25](#).

Parental Information Changes

On April 29, 2013, we posted [Dear Colleague Letter GEN-13-12](#), which alerted you to changes related to the collection of parental information. As described in this letter, beginning with the 2014-2015 FAFSA, dependent students are required to include income and other information from their legal parents (biological and/or adoptive) if those parents live together, regardless of the parents' marital status or gender.

For many years, the FAFSA has collected information about both of a student's parents only if the parents are married, and has used the gender-specific terms "mother/stepmother" and "father/stepfather." As a result, income and other information for one of the student's legal parents has been excluded when the parents are unmarried, even if those parents are living together. Collecting parental information from both of a dependent student's legal parents (biological and/or adoptive) will result in fair treatment of all families by eliminating longstanding inequities that were based on the relationship of the parents with each other rather than on the parents' relationship with their child.

Revised Responses for Parents' Marital Status Question

We changed the "Single" response for the parents' marital status question to "Never married" and added a new response labeled "Unmarried and both parents living together." The parents' marital status question responses are now reordered and displayed on the FAFSA as follows:

- Never married
- Unmarried and both parents living together
- Married or remarried
- Divorced or separated
- Widowed

Note: The response values for the parents' marital status question have not changed on the ISIR, and the new response "Unmarried and both parents living together" equals **5**.

The FAFSA instructs a dependent student to provide information about both of his or her legal parents, regardless of the parents' marital status or gender, if the parents live together. We updated the instructions to define a legal parent as the student's biological and/or adoptive parent.

Revised Labels for Parent Questions

Adding the new "Unmarried and both parents living together" response for the parents' marital status question resulted in FAFSA field label revisions for several of the parents' demographic and financial fields. Gender-neutral labels are now used when referencing a specific parent and are reflected on the paper FAFSA and throughout our application processing systems, including the CPS, FAFSA on the Web, FAA Access, and applicant communications (SAR, SAR Acknowledgement, eSAR, and ISIR). For example, fields previously labeled as "father/stepfather" are now labeled as "Parent 1 (father/mother)" or "Parent 1 (father/mother/stepparent)" and fields previously labeled as "mother/stepmother" are now labeled "Parent 2 (father/mother)" or "Parent 2 (father/mother/stepparent)." These changes are also documented for the financial aid community in guides and technical references (such as the *ISIR Guide* and *EDE Technical Reference*).

For further information about the collection of parental information, see [Dear Colleague Letter GEN-13-12](#).

New Tax Return Filing Status Questions

We added a new question for students and parents to collect their tax return filing statuses. The new questions are:

- 34. For 2013, what is or will be your tax filing status according to your tax return?
- 82. For 2013, what is or will be your parents' tax filing status according to their tax return?

The questions are included on the paper FAFSA, displayed in FAFSA on the Web, and listed in FAA Access for students and parents. The responses for the new questions are:

Single

Head of household

Married–filed joint return

Married–filed separate return

Qualifying widow(er)

Don't know

In FAFSA on the Web, these questions replace the current filtering questions that ask married students and parents if they filed as “Head of household” or as “Married–filed separate return.” The new questions help us identify instances when the reported tax filing status is inconsistent with the reported FAFSA marital status. Although the reported tax filing status may accurately reflect the student or parent tax filing status for the 2013 tax return, if the student's or parent's marital status has changed, the financial information from the IRS will not match what is expected based on the marital status as of the day the FAFSA is completed. Identifying these instances enables us to ask the student or parent to verify the responses are correct and to restrict the use of the IRS Data Retrieval Tool (IRS DRT) when the tax filing status for the 2013 tax return does not match the marital status at the time the FAFSA is completed. Examples of edits include:

- If a student or parent with a marital status other than “Unmarried and both parents living together” indicates he or she has “Already Completed” or “Will File” a tax return and selects a 2013 tax return filing status that does not match the current marital status, then we display a message to inform the student or parent the IRS tax information may not reflect the current marital status.

The student or parent is not eligible to use the IRS DRT if his or her 2013 tax return filing status does not match the current marital status.

- If a student or parent who was initially eligible to use the IRS DRT transfers data from the IRS and the IRS tax return filing status is inconsistent with the reported FAFSA marital status, then we no longer consider the data “Transferred from the IRS.”

When the student or parent returns to FAFSA on the Web, we inform the student or parent that we do not identify questions pre-filled with IRS tax information as “Transferred from the IRS,” because the tax return filing status transferred from the IRS does not match the tax return filing status that he or she selected on the FAFSA.

In addition to adding the edits described above, we are adding the following edits to minimize further the transfer of financial information from the IRS DRT that no longer reflects the student or parent’s current marital status:

- If a student or parent responds with a tax return filing status of “Don’t know” and is otherwise eligible to use the IRS DRT, then he or she must provide an actual tax return filing status before he or she can use the IRS DRT.
- If a parent indicates a marital status of “Widowed” and provides a tax return filing status of “Qualifying Widow(er),” then we instruct him or her to use the IRS DRT only if his or her spouse’s income was excluded from the tax return.

Application processing edits generate a comment code that is included on the SAR, SAR Acknowledgement, eSAR, ISIR, and in Student Inquiry whenever the tax return filing status and marital status do not match.

New IRS Display Flags

We added two new flags—Student IRS Display Flag and Parent IRS Display Flag—on the ISIR, SAR, SAR Acknowledgement, eSAR in FAA Access, and in Student Inquiry. The new IRS Display flags inform schools whether the IRS DRT was displayed to the student or parent, and, if not, the reason the IRS DRT was not displayed. The IRS Display flags are used in addition to the Student IRS Request Flag and Parent IRS Request Flag, which describe the student or parent’s use of the IRS DRT. The IRS Request flags inform schools whether tax information was requested from the IRS and whether the student or parent changed the requested data after it was transferred.

We describe the values for the IRS Display Flag fields in the table below.

Value	Student IRS Display Flag	Parent IRS Display Flag
A	Student skipped the income and asset questions – IRS DRT was not displayed	Dependent student has special circumstances or independent student skipped the parent questions – IRS DRT was not displayed
B	IRS DRT was displayed to student	IRS DRT was displayed to parent
C	Tax return filing status not equal to “Already completed” – IRS DRT was not displayed	Tax return filing status not equal to “Already completed” – IRS DRT was not displayed
D	Marital status date greater than or equal to January 2014 – IRS DRT was not displayed	Marital status date greater than or equal to January 2014 – IRS DRT was not displayed
E	First three digits of SSN are 666 – IRS DRT was not displayed	First three digits of SSN are 666 – IRS DRT was not displayed

Value	Student IRS Display Flag	Parent IRS Display Flag
F	Not Applicable	Non-married parent or both married parents entered all zeroes in SSN – IRS DRT was not displayed
G	Not Applicable	Neither married parent entered a valid SSN – IRS DRT was not displayed
H	Student amended his/her tax return – IRS DRT was not displayed	Parent amended his/her tax return – IRS DRT was not displayed
J	Student filed a Puerto Rican or foreign tax return – IRS DRT was not displayed	Parent filed a Puerto Rican or foreign tax return – IRS DRT was not displayed
K	Student is married and tax return filing status is married filed separate return – IRS DRT was not displayed	Parents are married and tax return filing status is married filed separate return – IRS DRT was not displayed
L	Student is married and tax return filing status is head of household – IRS DRT was not displayed	Parents are married and tax return filing status is head of household – IRS DRT was not displayed
M	<p>Conflict between the student's marital status and tax return filing status – IRS DRT was not displayed</p> <p><i>Note: This IRS Display Flag is used only when the student's tax return filing status is NOT head of household or married – filed separate return. In cases where the student's marital status is married and the tax return filing status IS head of household or married filed separate return, IRS Display Flag of K or L displayed.</i></p>	<p>Conflict between the parents' marital status and tax return filing status – IRS DRT was not displayed</p> <p><i>Note: This IRS Display Flag is used only when the parent's tax return filing status is NOT head of household or married – filed separate return. In cases where the parent's marital status is married or remarried and the tax return filing status IS head of household or married filed separate return, IRS Display Flag of K or L is displayed.</i></p>
N	Not Applicable	Parents' marital status is unmarried and both parents living together – IRS DRT was not displayed
Blank	IRS DRT not available (for example, paper, EDE, or FAA Access)	IRS DRT not available (for example, paper, EDE, or FAA Access)

Increased Field Lengths

In [Dear Colleague GEN-11-21](#), published in December of 2011, we described special actions that a financial aid administrator must take for the 2012-2013 and 2013-2014 award years when the CPS calculates a student's Expected Family Contribution (EFC) as 99,999. In most cases, institutions do not need to take any action. However, institutions with a higher cost of attendance are required to manually calculate an EFC if the student's ISIR or SAR reported EFC is 99,999 and any of the income or tax fields (such as Adjusted Gross Income, Income Earned From Work, or Taxes Paid) are reported on the ISIR or SAR as \$999,999. The manual calculation is required to ensure that the income and EFC for high-income students at high cost institutions is accurately reported.

For 2014-2015, we resolved this issue by increasing the length of all income and asset fields and all calculated EFC values, thereby eliminating the need for manually calculating EFCs. On the paper FAFSA, we increased the length for the responses for financial questions 36-37, 39-45, 85-86, and 88-94 to accept seven-digit values. In addition, we increased CPS assumed values for student and parent financial fields to include seven-digit values, calculated EFC values (Primary, Secondary, Alternate, and Signature Reject EFCs) to include six-digit values, and some EFC intermediate values (Total Income, Adjusted Available Income, Student's Total Income, and FISAP Total Income, and Available Income) to include eight-digit values.

We implemented these field length increases in FAFSA on the Web, FAA Access, and all CPS outputs, such as the SAR, SAR Acknowledgement, eSAR, ISIR, and Student Inquiry. Review the "Changes" column of the ISIR Record Description/Data Dictionary record layout in the *EDE Technical Reference*, "Record Layouts" section to identify the affected fields.

Verification Enhancements

We continue to refine our verification process and to conduct statistical analysis to establish the most effective and efficient criteria for selecting applicants with the highest probability of error on their FAFSA submissions for verification. Below, we describe the following changes to the verification process for the 2014-2015 award year:

- Added other untaxed income to the FAFSA items selected for verification
- Made adjustments to the verification tracking groups
- Added identity verification result functionality to FAA Access

For further information about 2014-2015 verification, including a chart of the FAFSA information you must verify and acceptable documentation for each Verification Tracking Group, see [Dear Colleague Letter GEN-13-16](#) and the [Federal Register Notice](#) published June 13, 2013.

Added Other Untaxed Income to FAFSA Items Selected for Verification

We published [Dear Colleague Letter GEN-13-16](#) on June 13, 2013, which announced 2014-2015 FAFSA information that may require verification and acceptable documentation for verifying that information for selected students.

As noted in the Dear Colleague letter, the 2014-2015 verification items are much the same as for the 2013-2014 award year with one addition—other untaxed income. For 2014-2015, certain applicants are required to verify the untaxed income information they provided on the FAFSA in question 45 (Student's 2013 Untaxed Income) for the student and question 94 (Parents' 2013 Untaxed Income) for the dependent student's parents. We place those records in the new V6 Verification Tracking Group for Household Resources verification.

If the financial aid administrator determines the amounts provided and verified from question 45, question 94, and other income information (Adjusted Gross Income, Income Earned From Work, or untaxed income excluded from the FAFSA, for example) do not appear to provide sufficient financial support for the number of household family members reported, the applicant's parents or spouse must explain how the family was financially supported during the 2013 calendar year.

Made Adjustments to the Verification Tracking Groups

To identify 2014-2015 records selected for verification, you should continue to review the Verification Flag, which the CPS sets to **Y** on selected records, and the Verification Tracking Flags, which the CPS uses to place selected applicants into Verification Tracking Groups. The assigned Verification Tracking Group determines the FAFSA information the applicant must verify. The applicant remains in the original 2014-2015 Verification Tracking Group for the entire 2014-2015 award year, regardless of subsequent corrections to the FAFSA.

We made the following adjustments to the Verification Tracking Groups:

- We no longer assign records to Verification Tracking Group V2 (SNAP-Food Stamps) for 2014-2015. Although we no longer use the V2 group, applicants in Verification Tracking Groups V1, V4, V5, and V6 must still verify SNAP-Food Stamps benefits if reported on the FAFSA.
- New for 2014-2015, we added a Verification Tracking Group V6 (Household Resources). For records placed in Verification Tracking Group V6, the applicant must verify any Other Untaxed Income reported in FAFSA questions 45 or 94.

The 2014-2015 Verification Tracking Flag values and corresponding Verification Tracking Groups are as follows:

- V1 = Standard Verification Group (Selected because conditions based on statistical analysis error-prone risk model were met)
- V2 = For Federal Student Aid use only
- V3 = Child Support Paid Verification Group (Selected for Child Support Paid criteria only)

- V4 = Custom Verification Group (Selected for Identity/Statement of Educational Purpose criteria and SNAP/Child Support Paid)
- V5 = Aggregate Verification Group (Selected for Identity criteria/Statement of Educational Purpose, Standard Verification criteria, and SNAP/Child Support Paid)
- V6 = Household Resources Verification Group (Selected for Other Untaxed Income and SNAP/Child Support Paid)

Added Identity Verification Results Functionality to FAA Access

We added an Identity Verification Results feature to FAA Access, enabling FAAs to provide the required verification results for students selected for identity and high school completion status. These are the applicants selected for Verification Tracking Groups V4 and V5.

Refer to the “FAA Access Application Processing Changes” section in this guide for more information about the process of reporting identity verification results using the new Identity Verification Results feature.

FAFSA on the Web Correction Instruction Enhancements

We learned through communications with the financial aid community and the Federal Student Aid Information Center that students and parents regularly use the IRS DRT in Student Correction Entry to transfer tax information from the IRS but fail to submit the correction for processing after they return to FAFSA on the Web. To minimize such instances, we made two changes to the application processing system for 2014-2015.

- **Enhanced Messaging after Data is Transferred** – We revised the message that displays when the student or parent returns to FAFSA on the Web after using the IRS DRT. The new message in Student Correction Entry clearly states that the student or parent is “almost” finished and that he or she must sign and submit the application and receive a “Confirmation” page to complete the correction.
- **New E-mails for Saved Corrections** – We will now send e-mails to students who save a correction in FAFSA on the Web and who, after seven days, still have not had a correction processed. We will send a similar e-mail to the parent of a dependent student if the parent’s e-mail address is included on the FAFSA. The notification reminds the student to complete, sign, and submit the correction for processing.

Loan Eligibility Changes

On July 6, 2012, a new regulation was signed into law that eliminates subsidies for Direct Subsidized Loans when a first-time borrower's enrollment exceeds 150% of the program length. Details regarding the reporting of academic year and loan periods to the Common Origination and Disbursement (COD) System are described in the [May 16, 2013 electronic announcement](#). We are implementing this regulation in two phases.

Phase 1: COD System Updates, July 2013

The first phase was implemented in July 2013 and created a method for the Department to identify "first-time borrowers." A first-time borrower is defined as any borrower without an outstanding loan balance on a Direct Subsidized, Direct Unsubsidized, PLUS loan (Parent PLUS and Grad PLUS), FFEL, or consolidation and/or converted TEACH Grant on or after July 1, 2013. To identify and track first-time borrowers, we added a new Subsidized Usage Limit Applies Flag, new warning edits, and system reports to the COD System.

Phase 2: NSLDS, CPS, and Additional COD System Updates

For 2014-2015, we added two new flags that are included on the ISIR and eSAR and are visible in FAA Access and ISIR Analysis Tool; however, these fields do not appear on the SAR or SAR Acknowledgement:

- **Subsidized Usage Limit Applies Flag** – This field identifies applicant records that are being tracked based on the conditions of the new regulation. Values for this flag are:
Y = 150% subsidy limitation applies
N = 150% subsidy limitation does not apply
Blank = Record not sent to match
- **Subsidized Loan Eligibility Used** – This field tracks the amount of the borrower's eligibility used in periods of .25 years based on his or her program of enrollment. This field contains numeric six-digit values, 000v000 to 999v999, where "v" is an implied decimal and is excluded from the output.

Comment code 267 is printed on an applicant's record to inform the applicant that the total amount of subsidized loan funds that can be received is limited and refers him or her to a Federal Student Aid Web site to obtain those amounts.

As part of its post-screening process, NSLDS now identifies applicants who have a Subsidized Usage Limit Applies Flag status change. For instance, an applicant that applies for aid for the current year and recently paid an existing loan in full is assigned an NSLDS Post-Screening Reason code of **25**. In addition, an applicant who has the NSLDS Post-Screening Reason Code set to **25** also has his or her Subsidized Usage Limit Flag Applies Flag set to **Y** by NSLDS.

Watch the IFAP Web site for an electronic announcement that will provide additional information for phase 2 changes.

2014-2015 Application Processing System Schedule

Schedule for the 2014-2015 Application Processing System

Date	Event
May 20, 2013	The Secretary of Education announces the annual updates to the tables used in the statutory “Federal Need Analysis Methodology” to determine an applicant’s EFC for the 2014-2015 Award Year (May 20, 2013 [78 FR 29353])
July 24, 2013	<p>Federal Student Aid announces the availability of the 2014-2015 Electronic Data Exchange (EDE) Technical Reference draft (including the ISIR Record Layout and ISIR Cross-Reference) on the IFAP and FSAdownload Web sites.</p> <p>The <i>EDE Technical Reference</i> provides programmer specifications and information that can assist you in designing or building your own software to communicate electronically with Federal Student Aid.</p>
August 1, 2013	<p>Federal Student Aid announces the availability of the 2014-2015 Application Processing System Specifications for Software Developers on the IFAP and FSAdownload Web sites.</p> <p>The <i>Application Processing System Specifications for Software Developers</i> provides CPS system edits that can assist you in designing and building your own software to communicate with Federal Student Aid.</p>

Schedule for the 2014-2015 Application Processing System (Continued)

Date	Event
August 26, 2013	<p>Federal Student Aid announces the availability of the EDEXpress for Windows Packaging Technical Reference on the FSAdownload Web site.</p> <p>The <i>Packaging Technical Reference</i> provides instructions and record layouts for schools and other organizations that need to integrate their software or systems with the EDEXpress 2014-2015 Packaging module (available January 2014). Record layouts are included for all imports from external systems, such as Packaging Import External Add, Packaging Import External Change, and Packaging Import Add Funds. Packaging module setup guidance and setup worksheets are also provided.</p>
September 18, 2013	<p>Federal Student Aid announces the availability of the FAFSA MyStudentData Download guide on the IFAP Web site. This guide includes the record layout for the FAFSA MyStudentData download file, which is available for students who file a FAFSA using the <i>FAFSA on the Web</i> site and have valid Federal Student Aid PINs and processed FAFSAs. The file includes a student's processed results in a machine-readable, plain text file.</p>
September 19, 2013	<p>Federal Student Aid announces the availability of the EFC Formula Guide on the IFAP Web site, pending final 2013 IRS tax legislation. This guide can be used to calculate an EFC.</p>
October 18, 2013	<p>Federal Student Aid announces the availability of the 2014-2015 CPS Test System User Guide on the FSAdownload Web site.</p> <p>This user guide describes the CPS Test System, a system in which you can test electronic application and correction data transmissions from your system with the CPS (outside of the normal CPS production environment). The test system will be available on December 29, 2013.</p>
October 23, 2013	<p>Federal Student Aid announces the availability of the 2014-2015 Electronic Data Exchange (EDE) Technical Reference on the IFAP and FSAdownload Web sites.</p> <p>The <i>EDE Technical Reference</i> provides programmer specifications and information that can assist you in designing or building your own software to communicate electronically with Federal Student Aid. The <i>EDE Technical Reference</i> includes information about record layouts, required edits, printing, and reject messages.</p>

Schedule for the 2014-2015 Application Processing System (Continued)

Date	Event
October 23, 2013	Federal Student Aid announces the availability of the 2014-2015 ISIR Guide on the IFAP and FSAdownload Web sites. The <i>ISIR Guide</i> assists FAAs in interpreting applicant information from an ISIR.
October 30, 2013	Federal Student Aid posts an electronic announcement asking schools to remind applicants to update their e-mail addresses in the CPS by January 13, 2014, so that Renewal Reminders can be sent to the correct e-mail address.
October 31, 2013	The 2014-2015 Federal School Code List is available online on the IFAP Web site and is updated quarterly.
Mid-November 2013	In preparation for the 2014-2015 processing cycle, postsecondary schools, high schools, libraries, and community agencies can begin to place orders for the FAFSA on the Web Worksheet from Federal Student Aid's online bulk publications ordering system (FSAPubs) located at FSAPubs.gov . The worksheet is a tool to assist students and parents who complete their FAFSA on the Web and generally follows the flow and logic of the online application. FSAPubs is your source for real-time information about Federal Student Aid's publications and their availability.
November 22, 2013	Federal Student Aid announces the availability of the 2014-2015 SAR Comment Codes and Text guide on the IFAP and FSAdownload Web sites. The <i>SAR Comment Codes and Text</i> guide provides the SAR comment codes, comment text, reject resolutions, and database match information.
December 2013	Federal Student Aid begins shipping orders of the 2014-2015 FAFSA on the Web Worksheet from Federal Student Aid's online bulk publications ordering system located at FSAPubs.
December 29, 2013	The 2014-2015 CPS Web Applications Demo System is available at fafsademotest.ed.gov . The user name is "eddemo" and the password is "fafsatest."
December 29, 2013	The CPS Test System is available. You can test electronic application and correction data transmissions from your system with the CPS (outside of the normal CPS production environment).
December 29, 2013	The PDF version of the FAFSA is available for download from the FAFSA on the Web site. Schools can also access the PDF from our Web sites, including FSAPubs.

Schedule for the 2014-2015 Application Processing System (Continued)

Date	Event
December 29, 2013	The PDF version of the FAFSA on the Web Worksheet is available to applicants on the FAFSA on Web site (fafsa.gov) and to schools on the IFAP Web site.
January 1, 2014	The 2014-2015 FAA Access to CPS Online Web site (faaaccess.ed.gov) is available to FAAs.
January 1, 2014	The 2014-2015 FAFSA on the Web site is available to applicants.
January 2, 2014	The 2014-2015 CPS begins processing.
January 3, 2014	EDExpress for Windows 2014-2015, Release 1.0, which includes Global, Application Processing, and Packaging functionality for the 2014-2015 processing cycle, is posted to the FSAdownload Web site.
Early January 2014	Students and parents can begin requesting up to three copies of the paper FAFSA from the Federal Student Aid Information Center (FSAIC) by calling 800/4-FED-AID (800/433-3243) .
January 13, 2014	<p>For applicants to receive a 2014-2015 Renewal Reminder, any needed corrections to 2013-2014 applicant records must be made by January 13, 2014. These corrections can include updating e-mail address or resolving 2014-2015 renewal eligibility issues, such as rejects. For example, if an applicant does not have a 2013–2014 transaction with an EFC because all transactions have reject codes, the rejects must be corrected by January 13, 2014 to create a valid transaction so that the applicant receives a reminder notification for the new award year.</p> <p>You can continue to submit 2013-2014 applications and correction transactions for 2014-2015 renewal eligibility purposes after January 13, 2014, but affected applicants do not receive Renewal Reminders. These applicants have access to their renewal FAFSA data, however.</p>
January 16, 2014 – January 22, 2014	Renewal Reminders are sent to renewal-eligible applicants with a valid e-mail address who have not yet filed a 2014-2015 FAFSA.
January 2014	Federal Student Aid announces the availability of the revised <i>2014-2015 Application Processing System Specifications for Software Developers</i> on the IFAP and FSAdownload Web sites.
February 2, 2014	The IRS DRT is available to applicants.

Schedule for the 2014-2015 Application Processing System (Continued)

Date	Event
April 2014	EDExpress for Windows 2014-2015, Release 2.0, which includes the William D. Ford Federal Direct Loan (Direct Loan), Federal Pell Grant (Pell Grant) and Teacher Education Assistance for College and Higher Education (TEACH) Grant modules for the 2014-2015 cycle, is posted to the FSAdownload Web site.
June 2014	The 2014-2015 ISIR Analysis Tool is available on the FAA Access to CPS Online Web site. The ISIR Analysis Tool is designed for any school that wants to review and analyze its ISIR data and better understand certain characteristics about its Title IV applicant population and verification process (federally selected or defined by the school). At this time, ISIR Analysis Tool options are also added to the CPS Web Applications Demo System, located at fafsademo.test.ed.gov . You must provide your institution's Federal School Code, the user name ("eddemo"), and password ("fafsatest") to access the demo version of the ISIR Analysis Tool.
Mid-June 2014	Direct Loan (DL) Tools for Windows, Release 14.0, is posted to the FSAdownload Web site. DL Tools is a supplemental software product for Direct Loan participants and contains Rebuild, Cash Management, and Compare functionalities for the 2012-2013, 2013-2014, and 2014-2015 cycles.
Late June 2014	The CPS accepts 2013-2014 paper and electronic FAFSAs and renewal FAFSAs until late June 2014. Watch the IFAP Web site for a Federal Register Notice that finalizes this deadline. Electronic FAFSAs must be transmitted to and received by the CPS by midnight Central Time (CT) to meet the deadline.
Mid-September 2014	The CPS accepts 2013-2014 paper and electronic corrections until mid-September 2014. Watch the IFAP Web site for a Federal Register Notice containing more information about this deadline. Electronic corrections must be transmitted to and received by the CPS by midnight CT to meet the deadline.
Late June 2015	The CPS accepts 2014-2015 paper and electronic FAFSAs until late June. Watch the IFAP Web site for a Federal Register Notice that finalizes this deadline. Electronic FAFSAs must be transmitted to and received by the CPS by midnight CT to meet the deadline.

Schedule for the 2014-2015 Application Processing System (Continued)

Date	Event
Mid-September 2015	The CPS accepts 2014-2015 paper and electronic corrections until mid-September 2015. Watch the IFAP Web site for a Federal Register Notice containing more information about this deadline. Electronic corrections must be transmitted to and received by the CPS by midnight CT to meet the deadline.

Summary of Changes to the 2014-2015 Paper Free Application for Federal Student Aid (FAFSA) and FAFSA on the Web

2014-2015 FAFSA and FAFSA on the Web Worksheet Availability

FAFSA

While most applicants use FAFSA on the Web to apply for financial aid, paper application options are still available. The paper FAFSA is a ten-page form (six application pages and four instructional pages) used to apply for Title IV aid. The FAFSA is also available as an electronic PDF document that can be printed and submitted by postal mail.

Paper FAFSA Request

Beginning in early 2014, applicants and families can request up to three copies of the paper FAFSA (in English or Spanish) by calling the Federal Student Aid Information Center (FSAIC) toll-free at **800/4-FED-AID (800/433-3243)**.

PDF FAFSA Availability

The PDF FAFSA is an official FAFSA that can be completed on the computer and printed, or it can be printed and completed by hand. The printed and signed PDF FAFSA is mailed to Federal Student Aid for processing or, in some instances, can be delivered to a school where the student's application data is entered and submitted using FAA Access or third-party software. The signed FAFSA is stored by the school according to Federal Student Aid's record retention requirements.

English and Spanish 508-compliant PDF versions of the 2014-2015 FAFSA will be available online for download in December 2013 from IFAP. Schools can also access the PDF FAFSA from our Web sites, including FSAPubs (in December 2013) and FAFSA on the Web (on December 29, 2013), by selecting the PDF link from "Other Filing Options" link.

FAFSA on the Web Worksheet

The FAFSA on the Web Worksheet is a tool that applicants can use to prepare for completing the online application process. The FAFSA on the Web Worksheet is a paper or electronic PDF document that presents some of the FAFSA questions in the order in which they appear on FAFSA on the Web. This form is available for bulk orders or printed from the Web.

The 2014-2015 FAFSA on the Web Worksheet is available for bulk order by schools. We recommend you continue to remind applicants and their parents that the worksheet is not a FAFSA and is not processed as such if submitted.

FAFSA on the Web Worksheet Paper Request

Orders for the 2014-2015 FAFSA on the Web Worksheet can be placed beginning mid-November 2013. At that time, postsecondary schools, high schools, libraries, and community agencies can order copies of the FAFSA on the Web Worksheet on the FSAPubs Web site. Distribution begins in mid-December 2013. Additional worksheets can be ordered from the FSAPubs Web site throughout the processing year.

FAFSA on the Web Worksheet PDF Availability

The FAFSA on the Web Worksheet will also be available in PDF in late December 2013 on StudentAid.gov and IFAP, and on December 29, 2013 on FAFSA on the Web.

2014-2015 Paper FAFSA Changes

This section describes changes and enhancements to the *paper* 2014-2015 FAFSA, many of which we also implemented on FAFSA on the Web. We added new questions for 2014-2015 and adjusted the question numbering; the question numbers listed below are for the 2014-2015 application.

We implemented the following changes to the paper FAFSA:

- **Colors** – The 2014-2015 FAFSA colors are blue for student information and purple for parent information.

The student color of the FAFSA continues with the four-year color rotation of green → blue → yellow → orange. Purple continues to be the color for parent information.

- **Revised Question 59 (Parents’ Marital Status Question) and Instructional Notes** – As described in the “Major Changes” section, we revised the Parents’ Marital Status question from “What is your parents’ marital status as of today” to “As of today, what is the marital status of your legal parents?” We reordered the responses, renamed one response, and added a new response:

Never married (renamed from “Single”)

Unmarried and both parents living together (new response for 2014-2015)

Married or remarried

Divorced or separated

Widowed

- **Revised Parent Labels** – Also as described in the “Major Changes” section, we revised the parent labels. In questions 24 and 25, “father” and “mother” were changed to “Parent 1” and “Parent 2,” and, in questions 61 to 68, 88, and 89, “father/stepfather” and “mother/stepmother” were changed to “Parent 1 (father/mother/stepparent)” and “Parent 2 (father/mother/stepparent).” Instructional notes were updated and are described later in this section.
- **Added Tax Filing Status Question** – We added a new question about the tax filing status of the applicant (question 34) and of the parents (question 82). As a result, the question numbering changed, and we reformatted some of the questions on the page. The new questions are:
 - Question 34, “For 2013, what is or will be your tax filing status according to your tax return?”
 - Question 82, “For 2013, what is or will be your parents’ tax filing status according to your tax return?”
- **Increased Financial Question Field Lengths** – Also as described in the “Major Changes” section, we increased the field lengths of financial fields from five or six bytes to seven bytes in questions 36, 37, 39 to 45, 85, 86, and 88 to 94.

- **Revised question 8 (Social Security Number)** – We added the sentence, “See notes page 2.” after the question label to provide instructions for Pacific Islander applicants.
- **Revised question 23 (Drug Convictions)** – We updated the informational text to “Answer ‘No’ if you have never received federal student aid or if you have never had a drug conviction for an offense that occurred while receiving federal student aid.”
- **Revised question 26 (High School Completion Status)** – We revised the General Educational Development (GED) certificate response to include “or state equivalent test.”
- **Revised questions 44a and 93a (Education Tax Credits)** – We revised the questions to remove the Hope tax credit.
- **Revised questions 45a and 94a (Payments to Tax-deferred Pension and Retirement Savings Plans)** – We added a new sentence instructing applicants to exclude employer contributions toward employee health benefits.
- **Revised questions 45i and 94i (Other Untaxed Income)** – We deleted the sentence “Also include the first-time homebuyer tax credit from IRS Form 1040—line 67” and added a new sentence, “Also include the untaxed portions of health savings accounts from IRS Form 1040 – line 25.” We also added, “extended foster care benefits” to the “Don’t include” statement.
- **Revised question 45j (Money Received or Paid on Behalf of the Student)** – We added the following text: “This includes money that you received from a parent whose financial information is not reported on this form and that is not a part of a legal child support agreement. See Notes page 2.”
- **Revised question 51 (Children You Support)** – We clarified the time-frame reference for the applicant. The question now reads, “Do you now have or will you have children who will receive more than half of their support from you between July 1, 2014 and June 30, 2015?”
- **Revised questions 56 and 57 (High School and HUD Homelessness Determination)** – We added the following phrase to both questions: “or were self-supporting and at risk of being homeless.”

Other miscellaneous instructional text updates include:

Page 1

- **“Using your Tax Return” section**
 - In the last sentence of the first paragraph, we added “you must” and added emphasis by using bolding and italics. The sentence now reads, “...you can submit your FAFSA now using estimated tax information, and then you ***must correct*** that information ***after you file*** your return.”
 - We revised the second sentence of the second paragraph to read, “In a few simple steps, most students and parents who filed a 2013 tax return can view and transfer their tax return information directly into their FAFSA.”

- **“Filling Out the FAFSA” section** – We reworded the first paragraph in this section to remove the term “unusual circumstances.”

Page 2

- **“Notes for question 8 (page 3)”** – We added new instructions for Pacific Island applicants, “Enter your Social Security Number (SSN). If you are a resident of the Freely Associated States (i.e., the Republic of Palau, the Republic of the Marshall Islands, or the Federated States of Micronesia) and were issued an identification number beginning with “666” when submitting a FAFSA previously, enter that number here. If you are a first-time applicant from the Freely Associated States, enter “666” in the first three boxes of the SSN field and leave the remaining six positions blank and we will create an identification number to be used for federal student aid purposes.”
- **“Notes for questions 14 and 15 (page 3)”** – We revised the last sentence of the second paragraph to read, “You will not be eligible for federal student aid. If you have a Social Security Number but are not a citizen or an eligible noncitizen, you should still complete the FAFSA because you may be eligible for state or college aid.”
- **“Notes for questions 16 and 17 (page 3)”** – We updated the notes to provide instructions for same-sex couples: “Consistent with the Supreme Court decision holding Section 3 of the Defense of Marriage Act (DOMA) unconstitutional, same-sex couples must report their marital status as married if they were legally married in a state or other jurisdiction (foreign country) that permits same-sex marriage, without regard to where the couple resides.”
- **“Notes for questions 35 (page 4) and 83 (page 6)”** – We removed the reference to the Hope tax credit.
- **“Notes for questions 38 (page 4) and 87 (page 7)”** – We revised the text to include “or has never been married.”
- **“Notes for questions 42 and 43...”**
 - We added notes for question 45j to “Notes for questions 42 and 43...” The notes include guidance for reporting money received or paid on the student’s behalf and for reporting non-custodial parent support.
 - The “Investments include” paragraph was updated to include text for reporting rental property.
- **“Notes for question 50 (page 5)”** – We updated the first sentence of the first and second paragraphs to include “(including basic training)” as part of active duty.

Page 6

- **Step Four (Parents)** – We updated the instructions to specify “parents” as “legal parents (your biological and/or adoptive parents)” and to reflect the new Parents’ Marital Status response, “Unmarried and both parents living together.”
- **Before Question 80** – We added new instructions, “If your answer to question 59 was “Unmarried and both parents living together,” contact 1-800-4-FED-AID for assistance with answering questions 80–94.”

Page 9

- **Updated Notes for Step Four** – We revised these notes and reordered the bullets to explain how to report parental information in light of the Supreme Court’s decision on the Defense of Marriage Act (DOMA).

Page 10

- **Updated the “Information on the Privacy Act and use of your Social Security Number” section** – We added the two new questions in the list of questions the applicant must answer and incremented the other question numbers.

2014-2015 FAFSA on the Web Changes and Enhancements

In the “Major Changes” section earlier in this guide, we described some of the 2014-2015 changes to FAFSA on the Web. In this section, we provide more information about the changes as they relate to FAFSA on the Web. These topics include:

- Parental Information Changes
- New Tax Return Filing Status Questions
- Correction Instruction Enhancement

We discuss other changes for 2014-2015 that apply only to FAFSA on the Web in this section. These topics include:

- Added an Edit to Prevent Conflicting Asset Information
- Revised High School Completion GED Response
- Clarified Instructions for Certain FAFSA Questions

Parental Information Changes

In the “Major Changes” section of this document, we discuss changes related to the collection of parental information. As a result of those changes, students can now choose from the following response options for the “As of today, what is the marital status of your legal parents (biological and/or adoptive)?” question in FAFSA on the Web:

Never Married

Unmarried and both parents living together

Married or Remarried

Divorced or Separated

Widowed

Because of the “smart logic” capabilities of FAFSA on the Web, responses other than the new “Unmarried and both parents living together” result in the same customized follow-up questions and instructions, as is currently the case for the 2013-2014 FAFSA on the Web. Only if the response to the parents’ marital status question is “Unmarried and both parents living together” does FAFSA on the Web present newly worded follow-up questions. For example, because unmarried parents may be of the opposite sex or of the same sex, when the response to the parents’ marital status question is “Unmarried and both parents living together,” follow-up questions refer to the parents as “Parent 1 (father/mother)” and “Parent 2 (father/mother)” or simply “parents.”

We relabeled the fields in FAFSA4caster, the eSAR, the Application Summary Report, and the List of Changes to replace “father/stepfather” with “Parent 1 (father’s/mother’s/stepparent’s)” and to replace “mother/stepmother” with “Parent 2 (father’s/mother’s/stepparent’s).”

We replaced or modified various help topics to reflect the new Parent's Marital Status response options, to explain the reporting of tax information for parents who filed separate tax returns, and to address the reporting of tax information for students or parents whose tax return type or tax return filing status is different from their spouse.

See the "Major Changes" section in this guide for more information about the new "Unmarried and both parents living together" response option and the resulting field label changes.

New Tax Return Filing Status Questions

In FAFSA on the Web, we display the new tax return filing status questions dynamically only to students and parents who indicate they have "Already Completed" or "Will File" a tax return, unless, in the case of the parents, they report a marital status of "Unmarried and both parents living together."

See the "Major Changes" section in this guide for a description of the edits we are implementing to restrict the use of the IRS DRT to transfer IRS tax information when we identify instances where the tax return filing status is inconsistent with the reported FAFSA marital status. Use of the IRS DRT is restricted in these instances to prevent the transfer of tax information that does not accurately reflect the household income.

Correction Instruction Enhancement

To minimize the frequency of students and parents using the IRS DRT to transfer tax information from the IRS in Student Correction Entry and failing to submit the correction for processing after they return to FAFSA on the Web, we made the following changes to the application processing system for 2014-2015:

- Modified the message displayed when the student or parent returns to FAFSA on the Web after using the IRS DRT
- Added a new e-mail notification that is sent to alert students and the parents of dependent students when a correction is saved in FAFSA on the Web but has not been processed after seven days

See the "Major Changes" section in this guide for more information about these changes.

Added an Edit to Prevent Conflicting Asset Information

Information appears to conflict and causes unnecessary corrections when a student or parent indicates that assets exceed the threshold amount but then enters total assets that are equal to or less than the threshold amount. We added a simple edit to prevent this from happening.

In Student Application Entry and Student Correction Entry, we display an error message when the response to the student's or parents' Asset Threshold Exceeded question is "Yes" and the sum of the Cash, Savings, and Checking; Real Estate/Investment Net Worth; and Business/Farm Net Worth is less than or equal to the asset threshold amount. The error message describes the discrepancy and prompts the student or parent to change the response to the Total Assets Exceeded question or to change the Cash, Savings, and Checking; Real Estate/Investment Net Worth; and Business/Farm Net Worth to the correct amount.

Revised High School Completion GED Response

We modified the help topic "When you begin college in the 2014-2015 school year, what will be your high school completion status?" to include information regarding state-authorized high school equivalent certificates. Students who have a state-authorized high school equivalent certificate that the issuing state recognizes as the equivalent of a high school diploma should select the "GED certificate" response.

In a future FAFSA on the Web release, we plan to revise the General Educational Development (GED) certificate response to include "or State equivalent test." After this change is implemented, students who have a state-authorized high school equivalent certificate that the issuing state recognizes as the equivalent of a high school diploma can select the "GED certificate or State equivalent test" response.

Clarified Instructions for Certain FAFSA Questions

We updated the FAFSA on the Web instructions for certain FAFSA questions that are reported to be problematic or to be a source of inaccurately reported FAFSA information. We list the changes below with a brief description of each:

- **Distributions from a 529 Plan** – We revised the online help text to clarify that distributions to a student beneficiary for a 529 plan owned by someone other than the parents or student (such as grandparents, aunts, and uncles) are included as untaxed income to the student as "money received, or paid on your behalf."
- **"Will File" Messaging** – We reworded the message that we display to students and parents who indicate a tax return filing status of "Will File" to emphasize the need to return to FAFSA on the Web to correct estimates after a tax return is filed. We use the words "**must return**" in place of "should return." We also specify the information the student or parent needs to provide by instructing him or her to update the tax return filing status and the final amounts from the 2013 tax return.
- **Reworded Dependency Question** – We reworded the dependency question related to dependent children as "Do you now have or will you have children who will receive more than half of their support from you between July 1, 2014 and June 30, 2015?" to clarify the question refers to children the student may not be supporting currently but will support during the award year.

- **Support from Non-custodial Parents** – We updated the help topic “What other money has been paid on your behalf?” to instruct students to include money received from a non-custodial parent that is not part of a legal child support agreement.
- **First-Time Homebuyer Tax Credit** – We removed information about the first-time homebuyer tax credit from the online help topics, because the first-time homebuyer tax credit is no longer on the IRS Form 1040.
- **Health Savings Accounts** – We added information about health savings accounts to the online help, because the untaxed portions of health savings accounts should be reported on the FAFSA as other untaxed income.
- **Students at U.S. Service Academies** – For the number of people in the student’s or parents’ household that will be college students in 2014-2015, we revised the online help text to explain that students at U.S. service academies should be excluded, because most of their primary educational expenses are paid for by the federal government.
- **State Application Programming Interface (API)** – We added information on the “Student Demographic” page for students with certain states of legal residence advising them to look for the “Confirmation” page option to transfer information from the FAFSA to a state application to apply for state-based financial aid. We display this message to students whose state of legal residence participates in the State API option.

New Data Transfer Option

In 2014-2015, we will increase the number of FAFSA completions through collaboration with entities currently providing other services to potential applicants. Students will have the option to pre-populate a 2014-2015 application using data collected by an approved external entity.

After a student or parent authorizes the data transfer and the FSA External Partner’s transmission completes successfully, FAFSA on the Web returns a secure URL, which the student can use to access the transferred information. Depending on the method designated by the FSA External Partner in the transmission, FAFSA on the Web sends the URL directly to the FSA External Partner or in an e-mail to the student.

When the student clicks the link, the FAFSA on the Web “Login” page is displayed, and the student must provide the identifiers associated with the link (student’s first name, last name, date of birth and Social Security number) to continue to the “My FAFSA” page.

The status of a student’s 2014-2015 FAFSA determines the student’s options when he or she reaches the “My FAFSA” page. When a student has FSA External Partner data available, FAFSA on the Web presents the following options, based on the status of his or her 2014-2015 FAFSA:

- A student who has no transactions on file for 2014-2015 can (1) pre-populate a FAFSA with the transferred data or (2) start a new FAFSA.
- A renewal-eligible student can (1) pre-populate a FAFSA with the transferred data, (2) use information from his or her 2013-2014 FAFSA to renew a 2014-2015 FAFSA, or (3) start a new FAFSA.

- A student who has a saved 2014-2015 FAFSA on file can (1) pre-populate a FAFSA with the transferred data, (2) continue the saved FAFSA, or (3) start a new FAFSA.
- A student who has already submitted a 2014-2015 FAFSA can view processed information.

The “My FAFSA” page displays the FSA External Partner’s name in the section describing the option to pre-populate the FAFSA with the transferred data. This shows the student the source of the information available to pre-populate his or her FAFSA.

We Value Your Comments and Suggestions!

Federal Student Aid continually seeks new and innovative ways to make applying for financial aid easier and more convenient for students and their families. Some of the changes we made to the 2014-2015 paper FAFSA and Web applications were the result of feedback and comments we received from you. As always, we appreciate your contributions to improving our systems and processes and encourage you to continue to share your suggestions with us. We are particularly interested in ways to continue simplifying the paper and online FAFSA by eliminating unnecessary data collection.

We encourage you to watch IFAP in 2014, when we will post a Federal Register Notice requesting public comments on the 2015-2016 FAFSA.

Summary of Changes to FAA Access to CPS Online

Enrollment Requirements

FAA Access to CPS Online

To ensure your school can take full advantage of 2014-2015 enhancements at the beginning of the processing cycle, the Primary Destination Point Administrator (DPA) of the TG Number used to send and receive FAFSA and ISIR correction data should verify your FAA Access enrollment status.

If your school is enrolled for 2013-2014, your enrollment carries over to 2014-2015.

Annually, your school's Primary DPA is required to actively confirm the FAA Access to CPS Online services and users associated with your school's TG Number. If you do not perform this confirmation when requested by Federal Student Aid, your staff's rights for FAA Access may be revoked, resulting in a "Primary DPA Validation Needed" error message when attempting to access the site. We encourage you to monitor the IFAP Web site regularly for electronic announcements regarding active confirmation requirements.

If your school is not enrolled for CPS Online services, your school's Primary DPA can complete the enrollment for FAA Access to CPS Online services for your school, including access to Return to Title IV (R2T4) on the Web and the ISIR Analysis Tool, through the Student Aid Internet Gateway (SAIG) Enrollment Web site, located at fsawebenroll.ed.gov.

A Federal Student Aid User Statement must be printed by the Primary DPA and signed by new users of FAA Access, R2T4 on the Web, or the ISIR Analysis Tool. While you are not required to mail Federal Student Aid User Statements to FSA's Participation Management system, you must retain signed copies at your school.

To access FAA Access (faaaccess.ed.gov), you must use an FSA User ID and password. Any FAA Access user at your school who does not have an FSA User ID can acquire one by completing the following steps:

Step 1: Go to the [SAIG Enrollment site](#) and click on the “FSA User ID Registration” link on the left-hand side of the home page.

Step 2: Enter the identifying information requested and click on “Submit.”

Step 3: Follow the remaining steps, which include establishing a password and setting up challenge questions.

During the FSA User ID registration process, the user will be presented with the e-mail address reflected within the SAIG Enrollment Web site. We will use this e-mail address to send the FSA User ID.

Note: As first explained in a [January 13, 2012 Electronic Announcement](#) on the IFAP Web site, one of the technology security initiatives we implemented in 2012 is a security process called Two Factor Authentication (TFA). Through TFA, when logging in to certain Federal Student Aid systems, including the FAA Access to CPS Online Web site, an authorized user is required to use a traditional User ID and Password as well as provide a One-Time Password (OTP). The OTP is generated by a registered token device that is in the physical possession of the user. We have completed our phased distribution of tokens and token registration/usage information to schools and most school users have successfully begun using TFA tokens to access FAA Access to CPS Online. If you have questions about TFA, send an e-mail to TFA_Communications@ed.gov.

R2T4 on the Web

R2T4 on the Web is a non-year-specific application developed to calculate the earned and unearned portion of Title IV program assistance in accordance with section 484B of the Higher Education Act. At this time, no changes to R2T4 on the Web are anticipated for the 2014-2015 cycle.

R2T4 on the Web is accessible through the FAA Main Menu of FAA Access and from the View menu in EDExpress.

Your staff members must be enrolled for FAA Access and Return of Title IV Funds to access R2T4 on the Web. The Primary or Secondary DPA of the TG Number currently used by your school to send and receive FAFSAs and ISIR corrections automatically has access to FAA Access and can add or modify rights. The Primary or Secondary DPA needs to enroll financial aid staff members for access to FAA Access and R2T4 on the Web.

ISIR Analysis Tool

The ISIR Analysis Tool Web application is designed for any school that wants to review and analyze its ISIR data and better understand certain characteristics about its Title IV applicant population and verification process (federally selected or defined by the school).

The ISIR Analysis Tool is accessible through the FAA Main Menu of FAA Access and from the View menu in EDEExpress. You must have Microsoft Internet Explorer Version 6.0, Service Pack 3, or higher to use the reporting features available in the ISIR Analysis Tool. You can also access the ISIR Analysis Tool site using the Mozilla Firefox browser, although only versions 3.6.X and 4.X (where X equals a specific version number) are supported.

Your staff members must be enrolled for FAA Access and the ISIR Analysis Tool to access the ISIR Analysis Tool. The Primary or Secondary DPA of the TG Number currently used by your school to send and receive FAFSAs and ISIR corrections automatically has access to FAA Access and can add or modify rights. The Primary or Secondary DPA needs to enroll financial aid staff members for access to FAA Access and the ISIR Analysis Tool.

Note: Using the ISIR Analysis Tool does not necessarily mean that your school is in the Quality Assurance (QA) Program or is exempt from federal verification requirements. To have these benefits, you must have a signed QA Amendment to your Title IV Program Participation Agreement (PPA).

Note: ISIR Analysis Tool options will be added to the CPS Web Applications Demo System in June 2014. This demonstration system, which automatically preloads with test ISIRs, enables schools interested in using the ISIR Analysis Tool to examine features such as standard and ad-hoc report generation in a mock-production environment.

EDEExpress 2014-2015 FAA Access Interface

To access FAA Access (including R2T4 on the Web and the ISIR Analysis Tool) through the EDEExpress 2014-2015 interface, you must follow the same enrollment procedures and use the same FSA User ID and password login credentials as you would to access the sites using your Web browser outside of EDEExpress 2014-2015.

You can save your TG Number, school code, and Application Save/Restore Password (used for initial applications only) in EDEExpress FAA Access setup (**Tools, Setup, Global, FAA Access**) or enter them each time you connect to FAA Access through the FAFSA and Student Inquiry tabs in EDEExpress. When you select these tabs, you are prompted for your FSA User ID and password, which are not stored in the EDEExpress database and must be entered separately from your TG Number and school code.

FAA Access Application Processing Changes

In the “Major Changes” section earlier in this guide, we describe many of the application processing changes that affect FAA Access Application Processing. In this section, we provide more detail about how you will experience these changes in FAA Access. These topics include:

- Parental Information Changes
- New Tax Return Filing Status Question
- New IRS Display Flags
- Verification Changes
- Added Reject 24 for NSLDS Fraud Loan Flag
- Added Edits to Prevent Conflicting Information
- Added Field to Track First-time Borrower Status for 150% Threshold
- Revised High School Completion GED Response
- Clarified Instructions for Certain FAFSA Questions

Parental Information Changes

In the “Major Changes” section of this guide, we described changes related to the collection of parental information. As a result of those changes, FAAs can now choose from the following response options for the “As of today, what is the marital status of your legal parents (biological and/or adoptive)?” question in FAA Access:

- Married or Remarried
- Never Married
- Divorced or Separated
- Widowed
- Unmarried and both parents living together

We relabeled the fields on the eSAR, Application Summary Report, List of Changes, Student Inquiry, and ISIR Compare to replace “father/stepfather” with “Parent 1 (father’s/mother’s/stepparent’s)” and to replace “mother/stepmother” with “Parent 2 (father’s/mother’s/stepparent’s).”

We replaced or modified various help topics to reflect the new Parent’s Marital Status response options, to address the reporting of tax information for parents who filed separate tax returns, and to address the reporting of tax information for students or parents whose tax return type or tax return filing status is different from their spouse.

See the “Major Changes” section in this guide for more information about the new “Unmarried and both parents living together” response option and the resulting field label changes.

New Tax Return Filing Status Question

In the “Major Changes” section in this guide, we described the new Tax Return Filing Status questions that we are adding to the FAFSA and to FAFSA on the Web. In FAA Access, we display the questions as follows:

- Student’s 2013 Tax Return Filing Status
- Parents’ 2013 Tax Return Filing Status

Instructions presented with the questions in FAA Application/Renewal Entry and Correction Entry tell you, the FAA, to complete the question only if the student or parent “Already Completed” or “Will File” a 2013 tax return, and the parents’ marital status is not “Unmarried and both parents living together.”

FAAs can choose from the following response options:

- Single
- Head of household
- Married–filed joint return
- Married–filed separate return
- Qualifying Widow(er)
- Don’t know

We display the new Tax Return Filing Status responses on the eSAR, Application Print Summary, Student Inquiry, and ISIR Compare.

See the “Major Changes” section in this guide for a description of the edits we implemented to identify instances where the tax return filing status is inconsistent with the reported FAFSA marital status. These processing edits generate comment codes that are included on the SAR, SAR Acknowledgement, eSAR, ISIR, and in Student Inquiry whenever the tax return filing status and the current marital status are inconsistent. The comment codes and comment text are displayed on the eSAR and in Student Inquiry. The comment codes are displayed in ISIR Compare.

New IRS Display Flags

In the “Major Changes” section in this guide, we described two new flags that are being added to the student’s record:

- Student IRS Display Flag
- Parent IRS Display Flag

We added these flags to inform schools whether the student or parent was presented with the IRS DRT and, if not, the reason the IRS DRT was not displayed.

You can view the student and parent IRS Display Flags in the “For Financial Aid Office Use Only” section of the eSAR, on the “FAA Information” page in Student Inquiry, and in ISIR Compare.

See the “Major Changes” section in the document for a table of the IRS Display values and descriptions.

Verification Changes

Refer to the “Major Changes” section in this guide for a complete description of the 2014-2015 verification changes. In this section, we describe what to look for in FAA Access:

- Verification Tracking Flag for Other Untaxed Income
- Identify Verification Results Feature
- Reject 23

Verification Tracking Flag for Other Untaxed Income

For 2014-2015, certain applicants are required to verify the untaxed income information they provided on the FAFSA in question 45 (Student’s 2013 Untaxed Income) for the student and in question 94 (Parents’ 2013 Untaxed Income) for the dependent student’s parents. We place those records in the new Verification Tracking Group for Household Resources verification and set the Verification Tracking Flag to **V6**.

To identify records selected for the Household Resources verification, look for the V6 Verification Tracking Flag on the “FAA Information” page in Student Inquiry, in ISIR Compare, or in the “For Financial Aid Office Use Only” section on the eSAR.

Identity Verification Results

The Identify Verification Results feature provides FAAs with a tool to submit the required verification results for students selected to verify their identity and high school completion status (Verification Tracking Groups V4 and V5).

In January 2014, financial aid administrators will be able to enter verification results manually; later in the year, they will be able to upload of results using a flat file. Watch the IFAP Web site for an electronic announcement that provides additional information on uploading verification results with a flat file.

To update verification results manually, select **Identity Verification Results** from the FAA Main Menu after logging in to the 2014-2015 version of FAA Access. Enter the TG Number for your Destination Point and select the school year you want to report. Select **Next**.

On the “Enter Results” page, enter the student’s SSN, Name ID (first two letters of last name), and Identity Verification Results value for each student record you want to submit to Federal Student Aid.

For the Identify Verification Results field, choose the response from the following list that best describes the verification process you completed for the student:

- Verification completed in person, no issues found
- Verification completed remotely, no issues found
- Verification attempted, issues found with identity
- Verification attempted, issues found with HS completion
- No response from applicant or unable to locate

After you add the results for five students, you can select **Enter More Results** to display additional entry fields on the Web page. You can enter up to a maximum of 2,000 students for each submission.

When you have completed your entries, select **Submit**. Upon successful completion of the submission, you will receive a confirmation listing the student verification results you entered and submitted. You cannot return later to review the results you previously submitted, so you should print the “Confirmation” page if you want to save the list for your records.

Reject 23

With the changes implemented for the 2013-2014 award year to establish targeted verification selection criteria related to identity criteria, we have been able to establish additional identity selection criteria. Additional analysis of our 2013-2014 selection and verification results has enabled us to identify new fraud-related criteria that will result in some rejected records.

For 2014-2015, we added CPS edits to set a new Reject 23. The CPS adds comment code 281 to records with a Reject 23 to inform the student that he or she must contact Federal Student Aid for assistance. Only Federal Student Aid can override Reject 23. If the FAA or student feels Federal Student Aid should override the reject, he or she must call the phone number provided in comment code 281 to request an override.

When a Reject 23 override is processed, the CPS adds comment code 283 to the record to inform the student, in a system-generated SAR, that the issues related to the FAFSA have been resolved and the processing of the FAFSA can continue.

For further information about 2014-2015 verification, including a chart of the FAFSA information you must verify and acceptable documentation for each Verification Tracking Group, see [Dear Colleague Letter GEN-13-16](#) and the [Federal Register Notice](#) published June 13, 2013.

Added Reject 24 for NSLDS Fraud Loan Flag

When NSLDS receives a record from the Office of the Inspector General indicating an applicant is no longer eligible for any federal aid because he or she has been convicted of fraudulently obtaining federal loan funds, NSLDS sends the CPS a **Y** in the NSLDS Fraud Loan Flag. For award years prior to 2014-2015, we process the NSLDS Fraud Loan Flag of **Y** by setting comment code 272 to warn the applicant that he or she is not eligible for aid.

Beginning on January 1, 2014, we process the NSLDS Fraud Loan Flag set to **Y** by adding a new Reject 24 to the 2013-2014 or 2014-2015 record. We continue to add comment code 272.

In FAA Access, we display Reject 24 in the Rejects Met field in the “For Financial Aid Office Use Only” section of the eSAR, on the “FAA Information” page in Student Inquiry, and in ISIR Compare.

Added Edits to Prevent Conflicting Asset Information

Information appears to conflict and causes unnecessary corrections when a student or parent indicates that assets exceed the threshold amount but then enters total assets that are equal to or less than the threshold amount. We added a simple edit to prevent this from happening.

In FAA Correction Entry, we display an error message when the response to the student’s or parents’ Asset Threshold Exceeded is **Yes** and the sum of the Cash, Savings, and Checking, Real Estate/Investment Net Worth, and Business/Farm Net Worth is less than or equal to the asset threshold amount. The error message describes the discrepancy and prompts you to change the response to the Total Assets Exceeded question or to change the Cash, Savings, and Checking, Real Estate/Investment Net Worth, and Business/Farm Net Worth to the correct amount.

Added Fields to Track First-time Borrower Status for 150% Threshold

In the “Major Changes” section of this guide, we describe the changes we are implementing to help schools identify students who meet the first-time borrower definition and to track the subsidized loan eligibility used by first-time borrowers. These changes include two new fields found on the ISIR and eSAR, and in FAA Access and ISIR Analysis Tool:

- Subsidized Usage Limit Applies Flag
- Subsidized Loan Eligibility Used

The Subsidized Usage Limit Applies Flag indicates whether the student is subject to the 150% Direct Subsidized Loan limitation. If the flag is set to **Yes**, the student is a first-time borrower and is subject to the 150% Direct Subsidized Loan Limit.

The Subsidized Loan Eligibility Used field indicates the total amount of subsidized loan eligibility used by a student, expressed in years or portions of years.

The Subsidized Usage Limit Applies Flag and the Subsidized Loan Eligibility Used value can be found in the “For Financial Aid Office Use Only” section of the eSAR, in the “Match Flags” section on the “FAA Information” page, and in ISIR Compare.

As part of its post-screening process, NSLDS now identifies applicants who have a Subsidized Usage Limit Applies Flag status change. For instance, an applicant who applies for aid for the current year and recently paid an existing loan in full is assigned an NSLDS Post-screening Reason Code of **25**. In addition, an applicant who has the NSLDS Post-screening Reason Code set to **25** also has his or her Subsidized Usage Limit Flag Applies Flag set to **Y** by NSLDS.

We display the NSLDS Post-screening Reason code of **25** in the NSLDS Post-screening Reasons field in the “For Financial Aid Office Use Only” section of the eSAR.

Revised High School Completion GED Response

We modified the help topic “High School or Equivalent Completed?” to include information regarding state-authorized high school equivalent certificates. In addition to selecting “GED Certificate” for students who have received or will have received a GED certificate before the first date of enrollment in college, FAAs should select “GED Certificate” when a student has a state-authorized high school equivalent certificate that the issuing state recognizes as the equivalent of a high school diploma. We also noted that a high school certificate of attendance or a certificate of completion is not the equivalent of a high school diploma.

In a future FAA Access release, we plan to revise the General Educational Development (GED) certificate response to include “or State equivalent test.” After this change is implemented, FAAs can select “GED certificate or State equivalent test” when a student has a state-authorized high school equivalent certificate that the issuing state recognizes as the equivalent of a high school diploma.

In FAA Access, the new “GED certificate or State equivalent test” response option will be displayed in the printed copy of the application information, List of Changes, Student Information, Print Summary, eSAR, and ISIR Compare.

Clarified Instructions for Certain FAFSA Questions

We updated the FAA Access instructions for certain FAFSA questions that are reported to be problematic or to be a source of inaccurately reported FAFSA information. We list the changes below with a brief description of each:

- **Distributions from a 529 Plan** – We revised the help text to clarify that distributions to a student beneficiary for a 529 plan owned by someone other than the parents or student (such as grandparents, aunts, and uncles) are included as untaxed income to the student as “money received, or paid on your behalf.”
- **Support from Non-custodial Parents** – We updated the help topics “What other money has been paid on your behalf?” and “Money Received or Paid on Student’s Behalf” to instruct FAAs that money not part of a legal child support agreement received from a non-custodial parent must be reported as untaxed income.
- **First-Time Homebuyer Tax Credit** – We removed information about the first-time homebuyer tax credit from the student and parents “Other Untaxed Income or Benefits” help topics because the first-time homebuyer tax credit is no longer on the IRS Form 1040.
- **Health Savings Accounts** – We added information about health savings accounts to the “Other Untaxed Income or Benefits” help topics, because the untaxed portions of health savings accounts are reported on line 25 on the IRS Form 1040.

Summary of Changes to the 2014-2015 CPS

Overview

This section describes changes to the following components of the CPS:

- Database Matches
- CPS Edits
- Need Analysis
- Application Output Sent to Students
- SAR Comments
- Mailing Addresses

Information about changes to the ISIR Record Layout is found in the [2014-2015 Electronic Data Exchange \(EDE\) Technical Reference](#), which is available on the IFAP and FSAdownload Web sites.

Database Matches

For 2014-2015, no changes were made to the edits associated with current external match agencies.

CPS Edits

We incremented the year references in data element field titles and year parameters in our edits by one year and revised edits for requirement changes. We adjusted data element field numbers to reflect data element changes, including new field values, and revised edits based on the new field lengths for financial information fields. We also added and modified several CPS edits for 2014-2015.

- **Student Date of Birth Edits** – We revised our date of birth edits to enable applicants who are under the age of 13 years and have completed their high school course work to apply for Federal Student Aid for the cycle. The applicant must file using a “modified” paper FAFSA that can be obtained by calling Federal Student Aid at (202) 377-3889. The applicant cannot file using FAFSA on the Web.
- **Parents’ Marital Status Edits** – We revised the current edits and added new edits for the new response option for the Parents’ Marital Status question. Because of these changes, we revised edits for Rejects E, F, J, K, S, T, 6, 7, and 9 and added new comment codes.
- **Tax Return Filing Status Edits** – We added edits to the system for the two new Tax Return Filing Status questions on the FAFSA. Because of these new edits, we added comment codes 361 through 368.
- **Subsidized Usage Limit Applies Flag Edit** – We added edits for the new regulations to eliminate subsidies for Direct Subsidized Loans when a first-time borrower’s enrollment exceeds 150% of the program length. Because of these changes, we added new edits that are used to generate comment code 267. When an applicant’s status has changed, we generate a new transaction and the NSLDS Post-Screening Reason code is set to **25**.
- **Verification Edits** – As we continue to analyze data and refine our verification selection criteria, we determined a need for new edits. Due to the sensitive nature of verification edits, we do not publish the details and conditions that cause an applicant to be selected for verification.
- **New Reject 23, Eligibility Hold Edits** – The new Reject 23 edits are part of our verification data analysis. Applicants who meet the conditions for our new Reject 23 are in an eligibility “hold,” and are not eligible for aid until they resolve the eligibility issue. To resolve a Reject 23, the FAA or applicant must contact Federal Student Aid as described in comment code 281. If the hold is removed, comment code 283 is set on the applicant’s record.
- **New Reject 24, NSLDS Fraud Loan Flag Edits** – We revised our edits for applicants who have their NSLDS Fraud Loan Flag set to **Y**. Currently, we set comment code 272, warning the applicant that he or she is not eligible for aid. Effective January 1, 2014, we revised our edits for the 2013-2014 and 2014-2015 cycles, and applicants who have the NSLDS Fraud Loan Flag set to **Y** now receive the new Reject 24. Comment code 272 continues to be set.

Need Analysis

We updated the need analysis offsets and Income Protection Allowances (IPAs) based on legislative changes and changes to questions on the 2014-2015 FAFSA. The methodology for determining the EFC is found in Part F of Title IV of the Higher Education Act of 1965, as amended.

The income threshold for an automatic zero EFC remains unchanged at \$24,000 for the 2014-2015 Award Year.

See the [May 20, 2013, Federal Register Notice](#) posted on the IFAP Web site for changes to the 2014-2015 need analysis tables. You can also consult the [2014-2015 EFC Formula Guide](#), posted to the IFAP Web site on September 19, 2013, for more information.

Application Output Sent to Students

For each transaction processed at the CPS, an output document is sent to the applicant: a paper SAR, SAR Acknowledgement, or an E-mail Notification of SAR Processing with information to access SAR data on the Web.

- **SAR** – This document is designed to notify the student of application and eligibility status and provide a paper-based means for correcting or confirming application data. Applicants can also request a SAR by calling the Federal Student Aid Information Center at **800/4-FED-AID (800/433-3243)**.
- **SAR Acknowledgement** – This document is designed to notify the student of application and eligibility status; however, if corrections are needed, the applicant uses FAFSA on the Web or contacts the school to submit corrections through FAA Access or a mainframe system.
- **E-mail Notification of SAR Processing** – This e-mail notifies the student of application and eligibility status more quickly than the paper SAR or the SAR Acknowledgement. The applicant can view the SAR online and print the online SAR document as often as needed. The e-mail includes a link to the FAFSA on the Web “Login” page where the applicant, after being authenticated, can view and print the SAR.

For more information on how the CPS determines the type of output document sent to applicants, see Appendix D of the [2014-2015 ISIR Guide](#), which can be downloaded from the IFAP and FSAdownload Web sites.

SAR Changes

We made the following changes to the SAR:

- **Tax Return Filing Status** – We added two Tax Return Filing Status questions to the SAR, one for the student and one for the parents.
- **Revised Labels** – We revised the “Father” and “Mother” references in labels to “Parent 1” and “Parent 2,” respectively.
- **Parents’ Marital Status Response Changes** – As described earlier in this guide in the “Major Changes” section, we revised the response for “Single” to “Never married” and added a new response of “Unmarried and both parents living together.”
- **Updated Field Lengths** – We increased the length of the financial and EFC fields as described in the “Major Changes” section earlier in this guide.
- **IRS Display Flags** – We added two IRS Display Flags to the “FAA Information” section on the SAR, one for the student and one for the parent.

SAR Acknowledgement Changes

We made the following changes to the SAR Acknowledgement:

- **Tax Return Filing Status** – We added two Tax Return Filing Status questions to the SAR Acknowledgement, one for the student and one for the parents.
- **Revised Labels** – We revised the “Father” and “Mother” references in labels to “Parent 1” and “Parent 2,” respectively.
- **Parents’ Marital Status Response Changes** – As described earlier in this guide in the “Major Changes” section, we revised the response for “Single” to “Never married” and added a new response of “Unmarried and both parents living together.”
- **Updated Field Lengths** – We increased the length of the financial and EFC fields as described in the “Major Changes” section earlier in this guide.
- **IRS Display Flags** – We added two IRS Display Flags to the “FAA Information” section on the SAR Acknowledgement, one for the student and one for the parent.

Paper Output Changes

We made the following change to the paper SAR and SAR Acknowledgement:

- **Color** – Paper 2014-2015 SARs and SAR Acknowledgements are printed on blue paper to match the color scheme of the 2014-2015 paper FAFSA.

SAR Comments

SAR comments appear on SARs that are mailed to applicants. These comments are displayed on the eSAR that applicants view on FAFSA on the Web and are printed on the ISIR report from EDEXpress.

Each year we make annual rollover changes, such as updating year references, item numbers, and deadline dates. We also revise agency names and update mailing addresses and phone numbers where necessary.

Because of parental question label changes, we also revised the comment text to reflect these changes. Some of the more significant changes to the comment text are described below.

Comment(s)	Reason Comment(s) Appear on the Record
267	Identifies an applicant who has the new NSLDS Subsidized Usage Limit Applies Flag set to Y . Informs the applicant that the total amount of subsidized loan funds that can be received is limited and refers him or her to a Federal Student Aid Web site to obtain those amounts.
281	Reject 23 is set on the applicant's record identifying a record on the new Federal Student Aid "hold."
283	Reject 23 resolved, applicant removed from the Federal Student Aid "hold."
344	New NSLDS defaulted loan contact, ECSI Federal Perkins Loan Servicer
361 to 364	Identifies an applicant whose Parents' Marital Status conflicts with their Tax Return Filing Status.
365 to 368	Identifies an applicant whose Student's Marital Status conflicts with his or her Tax Return Filing Status.
369	Reject 6 is set on the applicant's record, Parent 1's Social Security Number was not matched with the Social Security Administration, and parents' marital status is unmarried and both parents living together.
370	Reject 7 is set on the applicant's record, Parent 2's Social Security Number was not matched with the Social Security Administration, and parents' marital status is unmarried and both parents living together.
371	Parent 1's Social Security Number was not matched or verified and Parent 2's was matched with the Social Security Administration.
372	Parent 2's Social Security Number was not matched or verified and Parent 2's was matched with the Social Security Administration.
373	Reject S is set on the applicant's record, Parent 1's Social Security Number was matched, but no date of birth match and parents' marital status is unmarried and both parents living together.

Comment(s)	Reason Comment(s) Appear on the Record
374	Reject S verified, Parents' Marital Status is unmarried and both parents living together.
375	Reject T is set on the applicant's record, Parent 2's Social Security Number was matched, but no date of birth match and parents' marital status is unmarried and both parents living together.
376	Reject T verified, Parents' Marital Status is unmarried and both parents living together.
377	Reject E is set on the applicant's record, Parent 1's Social Security Number was matched, but no name match and parents' marital status is unmarried and both parents living together.
378	Reject E verified, Parents' Marital Status is unmarried and both parents living together.
379	Reject F is set on the applicant's record, Parent 2's Social Security Number was matched, but no name match and parents' marital status is unmarried and both parents living together.
380	Reject F verified, Parents' Marital Status is unmarried and both parents living together.
381	Parent 1's Social Security Number and name was matched but no match on date of birth and Parent 2 was matched with the Social Security Administration, and Parents' Marital Status is unmarried and both parents living together.
382	Parent 2's Social Security Number and name was matched but no match on date of birth and Parent 1 was matched with the Social Security Administration, Parents' Marital Status is unmarried and both parents living together.
383	Parent 1's Social Security Number was matched but no match on name and Parents' Marital Status is unmarried and both parents living together.
384	Parent 2's Social Security Number was matched but no match on name and Parents' Marital Status is unmarried and both parents living together.
385	Parent 1's Social Security Number, name, and date of birth match a record on the deceased file and Parents' Marital Status is unmarried and both parents living together.
386	Parent 2's Social Security Number, name, and date of birth match a record on the deceased file and Parents' Marital Status is unmarried and both parents living together.

Comment(s)	Reason Comment(s) Appear on the Record
387	Reject 9 is set on applicant's record, student is dependent and one of Social Security Number, last name, or date of birth are missing for both parents and Parents' Marital Status is unmarried and both parents living together.
388	Reject J is set on the applicant's record; Parent 1's Social Security Number contains all zeroes and is reported as a tax filer and parents' marital status is unmarried and both parents living together.
389	Reject K is set on the applicant's record; Parent 2's Social Security Number contains all zeroes and reported as a tax filer and parents' marital status is unmarried and both parents living together.
390	Indicates a record that was processed without being sent to one or more matches.
391	Applicant reported that his or her parents did file or will file a tax return but did not provide parent social security numbers.

For a full listing of the 2014-2015 SAR comment code text and a description of changes to comment text, see the [2014-2015 SAR Comment Codes and Text](#) guide, located on the IFAP and FSAdownload Web sites.

Mailing Addresses

FAFSA Processor

FAFSA (Including Pacific Islanders)	Federal Student Aid Programs P.O. Box 4691 Mt. Vernon, IL 62864-0059
PDF FAFSA	Federal Student Aid Programs P.O. Box 4692 Mt. Vernon, IL 62864-4692
Spanish FAFSA	Federal Student Aid Programs P.O. Box 4693 Mt. Vernon, IL 62864-0063
Spanish PDF FAFSA	Federal Student Aid Programs P.O. Box 4697 Mt. Vernon, IL 62864-4697
SAR	Federal Student Aid Programs P.O. Box 4694 Mt. Vernon, IL 62864-0064
Spanish SAR	Federal Student Aid Programs P.O. Box 4695 Mt. Vernon, IL 62864-0065

Signature Pages

FAFSA on the Web (including corrections)	Federal Student Aid Programs P.O. Box 4696 Mt. Vernon, IL 62864-0066
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Getting Help

Customer Service

FSATECH Listserv

FSATECH is an e-mail listserv for technical questions about Federal Student Aid systems, software, and mainframe products.

For information on subscribing, go to ed.gov/offices/OSFAP/services/fsatechsubscribe.html.

CPS/SAIG Technical Support

800/330-5947 (TDD/TTY 800/511-5806) or 319/665-4762

Federal Student Aid maintains this call center to address questions about CPS processing, the FAA Access to CPS Online Web site, the CPS Web Applications Demonstration Web site, PC software such as EDEXpress and EDconnect, SAIG enrollment and data transmissions, and to collect system enhancement suggestions.

Representatives are available Monday through Friday, 8 A.M. to 8 P.M. Eastern Time (ET).

E-mail: CPSSAIG@ed.gov

Federal Student Aid Information Center (FSAIC)

800/4-FED-AID (800/433-3243); 319/337-5665; or TDD/TTY 800/730-8913

E-mail: FederalStudentAidCustomerService@ed.gov

The Federal Student Aid Information Center (FSAIC) serves the public with information about the federal student aid application process. FSAIC customer service representative support is provided in English and Spanish and includes a toll-free telephone number, Interactive Voice Response Unit (IVRU) self-service, e-mail, or Live Help. Customers include students, parents, and FAAs seeking general information about federal grant and loan programs and assistance with the FAFSA (paper and FAFSA on the Web versions, including Federal Student Aid PIN assistance) and student aid processing timeframes.

Types of FSAIC assistance also include: FAFSA application status checks, completion of FAFSA and FAFSA corrections, requests to change addresses and Federal School Codes on the FAFSA, duplicate SAR requests, identification of student loan holders (including contact information), and Federal Student Aid publication fulfillment.

Representatives are available to answer Live Help and phone inquiries Monday through Friday and on certain Saturdays and Sundays during peak processing as defined in the table below. FSAIC is closed on federal holidays with the following exceptions:

- New Year's Day, open from 9 A.M. to 6 P.M. (ET)
- Martin Luther King Jr.'s Birthday, open from 8 A.M. to 11 P.M. (ET)
- Washington's Birthday, open from 8 A.M. to 11 P.M. (ET)

FSAIC is also closed the day after Thanksgiving and December 24.

Month	Weekday Hours (ET)	Saturday Hours (ET)	Sunday Hours (ET)
January	8 A.M. to 11 P.M.	8 A.M. to 5 P.M.	12 P.M. to 6 P.M. Second 2 weeks
February	8 A.M. to 11 P.M.	8 A.M. to 5 P.M.	12 P.M. to 6 P.M.
March	8 A.M. to 11 P.M.	8 A.M. to 5 P.M. First 2 weeks	<i>None</i>
April	8 A.M. to 10 P.M.	<i>None</i>	<i>None</i>
May	8 A.M. to 10 P.M.	<i>None</i>	<i>None</i>
June	8 A.M. to 11 P.M.	8 A.M. to 5 P.M. Second 2 weeks	<i>None</i>
July	8 A.M. to 11 P.M.	8 A.M. to 5 P.M.	12 P.M. to 6 P.M.
August	8 A.M. to 11 P.M.	8 A.M. to 5 P.M.	12 P.M. to 6 P.M.
September	8 A.M. to 10 P.M.	8 A.M. to 5 P.M. First 2 weeks	<i>None</i>
October	8 A.M. to 10 P.M.	<i>None</i>	<i>None</i>
November	8 A.M. to 10 P.M.	<i>None</i>	<i>None</i>
December	8 A.M. to 10 P.M.	<i>None</i>	<i>None</i>

Reach FSA

855/FSA-4-FSA (855/372-4322)

This new phone number provides a simplified way for the financial aid community to access these ten Federal Student Aid (FSA) School Contact Centers:

- Campus-Based Call Center
- COD School Relations Center
- CPS/SAIG Technical Support
- eZ-Audit Help Desk
- Federal Student Aid Research and Customer Care Center (RCCC)
- Foreign Schools Participation Division
- G5 Hotline
- NSLDS Customer Support Center
- Nelnet Total and Permanent Disability Servicer
- School Eligibility Service Group

Note: You can continue to use the specific phone number for each contact center.

Federal Student Aid's Research and Customer Care Center (RCCC)

800/433-7327 (phone); 202/275-5532 (fax)

This call center provides information on and assistance with Title IV policy, regulations, application processing questions, and contacting other Federal Student Aid staff.

Representatives are available Monday through Friday, 9 A.M. to 5 P.M. (ET).

E-mail: fsa.customer.support@ed.gov

CPS Web Applications Demonstration System

Demonstration versions of the FAFSA on the Web and FAA Access to CPS Online Web sites are available through the CPS Web Applications Demonstration System, a training tool for students, parents, and your financial aid staff.

This demonstration system offers most of the features of the production Web sites for FAFSA on the Web and FAA Access (including the ISIR Analysis Tool and R2T4 on the Web) and is preloaded with test data for your use.

The demonstration system will be available for use at fafsademotest.ed.gov with 2014-2015 options on December 29, 2013. ISIR Analysis Tool options will be added to the demonstration system in June 2014, at the same time we release the 2014-2015 production version of the ISIR Analysis Tool.

New for 2014-2015: Beginning with the 2014-2015 version of the demonstration system, users will now have access to both the current and prior cycle's versions of our Web sites in the demonstration system. For the FAFSA on the Web feature, we are adding a tab for the previous award year to the "My FAFSA" page. Pre-loaded demonstration data will be available for both award years.

You can log in to the demo sites, when available, using the following user name and password:

- User Name: eddemo
- Password: fafsatest

Note: The user name and password fields are case-sensitive.

The FAA Login information is:

- Destination Code: TG999999
- Federal School Code: 001002, unless logging into ISIR Analysis Tool, in which case you should use your Federal School Code

Other Helpful Documents

We encourage you to review other documents on the [IFAP](#) and [FSAdownload](#) Web sites for more information about changes to the 2014-2015 application processing system:

- [2014-2015 Application Processing System Specifications for Software Developers](#), August 1, 2013: Provides CPS system edits that can assist you in designing or building your own software to communicate with Federal Student Aid. Available on the IFAP and FSAdownload Web sites. A final version will be posted in January 2014.
- [2014-2015 EFC Formula Guide](#), September 19, 2013: Provides worksheets and tables that can be used to calculate an estimated EFC for students. Available on the IFAP Web site.
- [2014-2015 Electronic Data Exchange \(EDE\) Technical Reference](#), October 23, 2013: Describes the 2014-2015 EDE process and provides programmer specifications and information that can assist you in designing or building your own software to complement or take the place of the EDEExpress software to exchange data electronically with Federal Student Aid. Available on the IFAP and FSAdownload Web sites.
- [2014-2015 ISIR Guide](#), October 23, 2013: Provides in-depth information regarding the 2014-2015 ISIR. Available on the IFAP and FSAdownload Web sites.
- [2014-2015 SAR Comment Codes and Text](#), November 22, 2013: Describes changes to the SAR comment codes and associated text for 2014-2015 and database match information. Available on the IFAP and FSAdownload Web sites.
- [2014-2015 FAFSA on the Web Data Transfer Technical Reference](#), Fall 2013: Describes the process of transferring electronic FAFSA information from an organization to FAFSA on the Web. Also includes information about how organizations enroll for the service, the technical aspects of transferring data, options for testing the transfer process, and the FAFSA on the Web user experience when using transferred data.
- [2014-2015 FAFSA MyStudentData Download](#) guide, September 18, 2013: Describes the FAFSA MyStudentData Download file structure, including record layout and valid values.
- [2014-2015 FAFSA on the Web Preview Presentation](#), December 2, 2013: Microsoft PowerPoint presentation containing information and screen shots pertaining to the 2014-2015 FAFSA on the Web site.
- English and Spanish versions of the FAFSA and FAFSA instructions will be available in December 2013 for download from ifap.ed.gov/ifap/processing/fafsaAndSARMaterialsPR.jsp.
- English and Spanish versions of the [2014-215 Student Aid Eligibility Worksheet](#), December 17, 2013.
- English and Spanish versions of the FAFSA on the Web Worksheet will be available for download on December 29, 2013 from [FAFSA on the Web](#). To access the worksheet, use the Search feature at the top of the FAFSA on the Web pages and search for “FAFSA on the Web Worksheet.”

Federal Student Aid Web Sites

- CPS Web Applications Demonstration System: fafsademotest.ed.gov
The user name is “eddemo” and the password is “fafsatest.”
- FAA Access to CPS Online (including R2T4 on the Web and the ISIR Analysis Tool): faaaccess.ed.gov
- FAFSA on the Web: fafsa.gov
- Federal Student Aid Conferences Web site: fsaconferences.ed.gov
- Federal Student Aid PIN: pin.ed.gov
- Federal Student Aid Publication Ordering: FSAPubs.gov
- FSAdownload Web site: fsadownload.ed.gov
- FSATECH e-mail listserv subscription information: ed.gov/offices/OSFAP/services/fsatechsubscribe.html
- Information for Financial Aid Professionals (IFAP) Web site: ifap.ed.gov
- National Student Loan Data System (NSLDS) Professional Access Web site: nsldsfap.ed.gov
- Quality Assurance Web site: ifap.ed.gov/qahome/Default.html
- Student Aid.gov: StudentAid.gov
- Student Aid Internet Gateway (SAIG) Enrollment: fsawebenroll.ed.gov
- Training Information and Registration Web site for upcoming training opportunities and learning resources: ed.gov/offices/OSFAP/training/index.html